FCMT Advanced Find User Guide

Abstract

This user help document was created to provide an overview of the FCMT functionality of creating advanced find views and queries. FCMT is a web application shared among several VBA and VHA programs, initially built for FRCP. Initially, Service Member information is transferred from DEERS, a Department of Defense personnel record system, to FCMT during the client registration process. Additional information is added to FCMT by users depending on their program requirements and information available from the client engagement.

Because the FCMT application will undergo scheduled enhancements through the year, this document is not finalized and should always be considered in a draft state. Users should refer to this document to better understand the layout of the FCMT process and how the application maps to each business data element. This will improve consistency in FRCP data entry and usage of the application. Unless systematically enforced, users should familiarize themselves as well with the business and management processes which ultimately govern this process.

Table of Contents

Table of Contents

Abstract 1

Table of Contents 2

Introduction 3

Advanced Find/Specific Views 3

Creating New Advanced Find View 3

Editing Columns 6

Add Columns 7

Reorder Fields 8

Remove Fields 9

Change Sorting 9

Saving View 10

Sharing View 12

Exporting to Excel 13

Advanced Filtering 14

Conclusion 16

Introduction

One of the advanced features of FCMT is the ability to create customized views either for one specific user or to be shared between different users. As an example, a user might need a view to show all Cases where the Clients are currently located at a specific Facility. This view can be created and saved to be reused in the future and shared to other users if they also need this type of a view.

Using the Advanced Find function is a great way to separate data you want to see from the rest of the data in the FCMT Database. It uses a defined query to filter the results that are found. Also, it can be used to prepare data to export to Microsoft Office, i.e. Microsoft Excel, to create specialized reports.

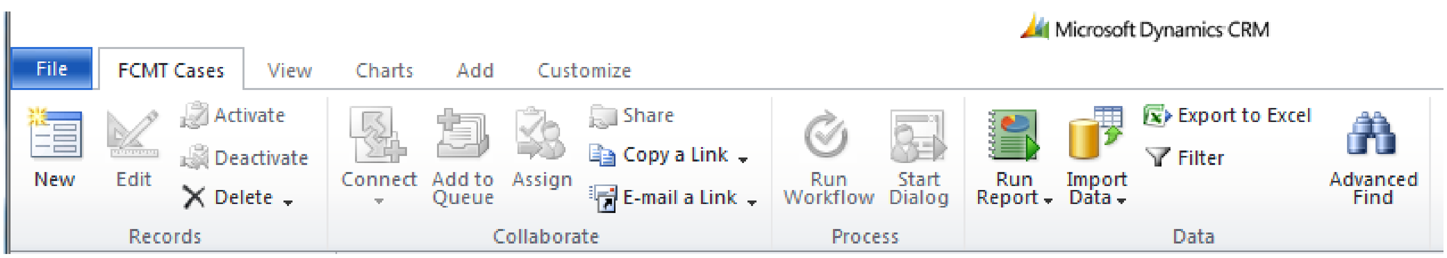
Although there are security roles setup in the system for specialized tasks such as maintaining users and creating new picklist values, most users have the same security level and can view all transactional records in the system (Case, Contacts, Clients, FIRPs, Medical Information.) These security rights are preserved in the Advanced Find functionality as well and although a user can create views to look at data elements that they might not have the rights to view, the actual data records will not be displayed if they do not have rights to that specific data.

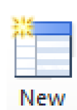
Advanced Find/Specific Views

Creating New Advanced Find View

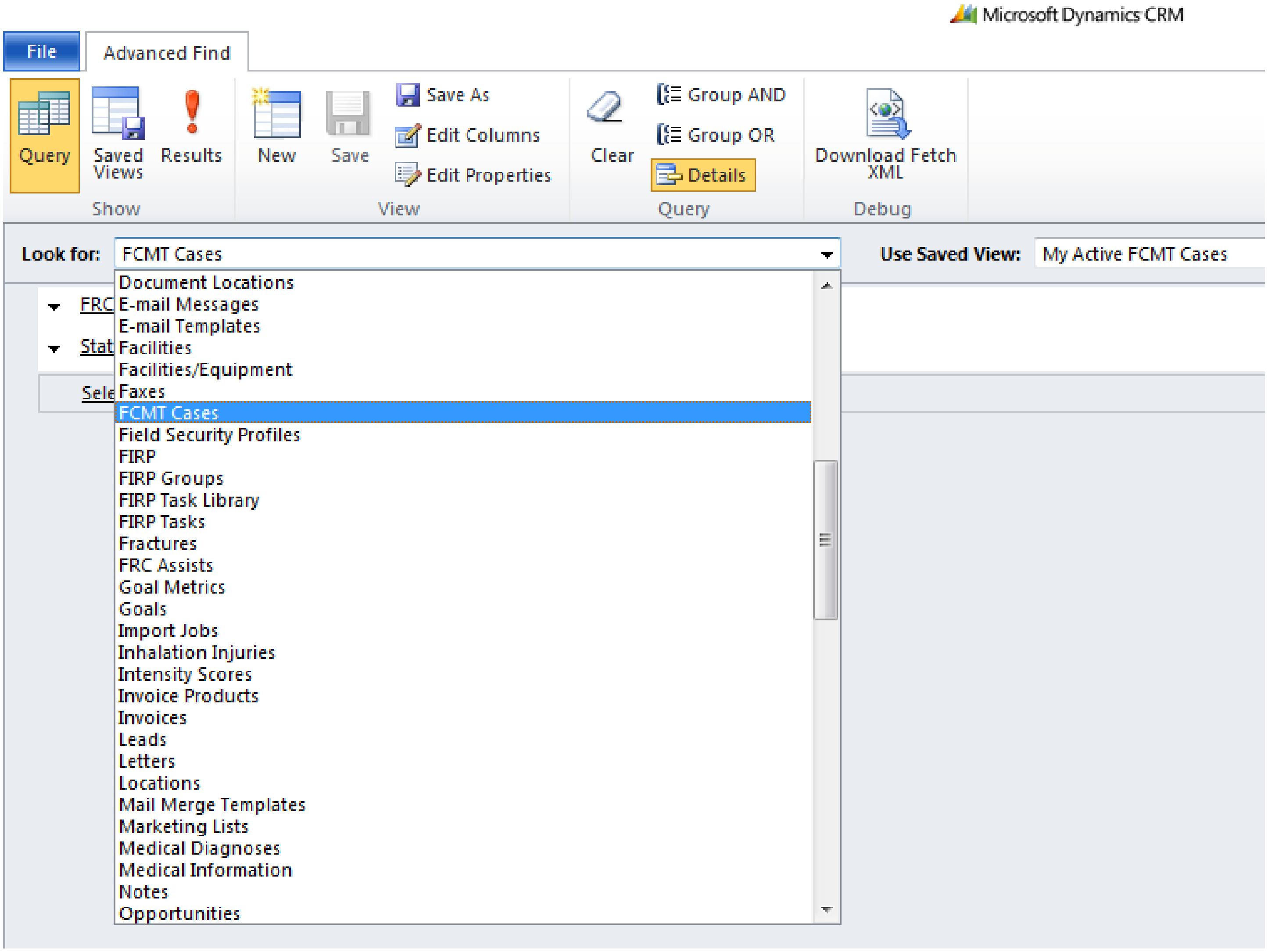
To get started, click on the **Advanced Find** button 

in the ribbon of any view in FCMT. It is helpful to go to a similar view and then click on the "Advanced Find" button. This will inherit the attributes of the selected view and possibly save the user time in creating the new view.

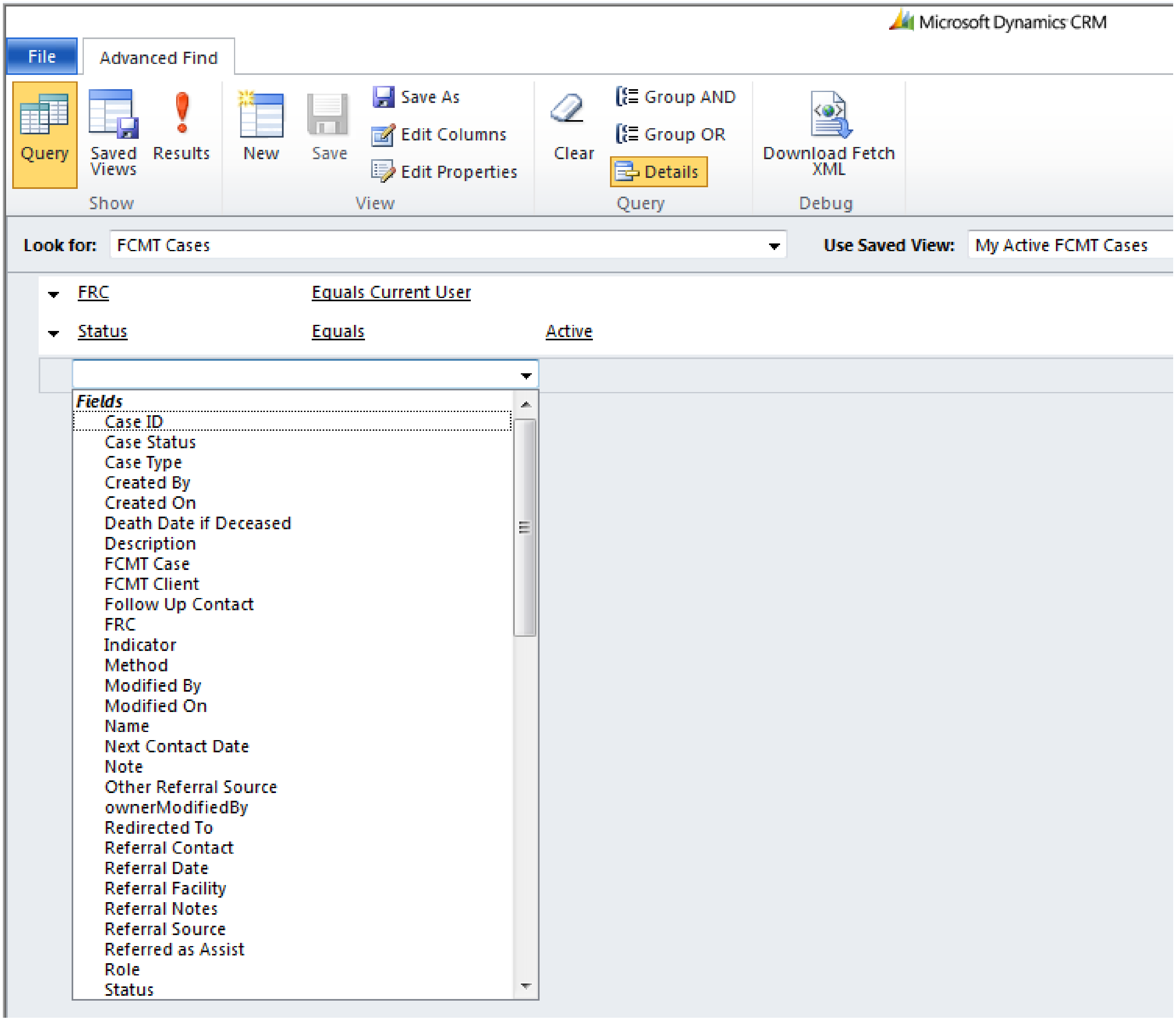


Start creating the query by pressing the **New** button 

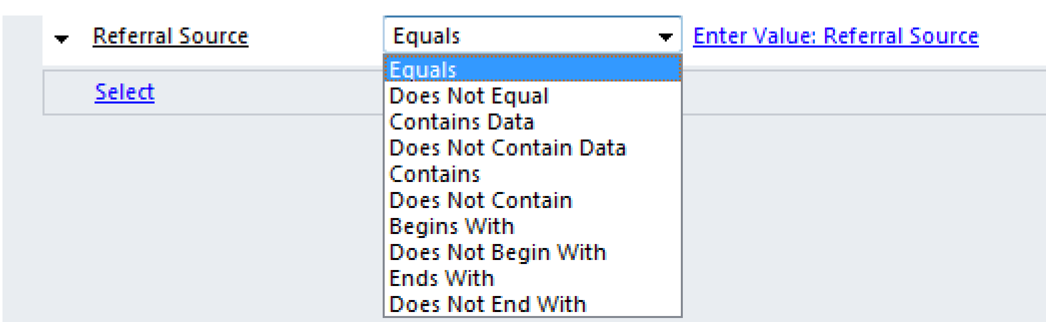
and then choosing which primary *Record Type* under the *Look for* list. In this example we will use the FCMT Case entity and create a new view to find Cases with referral source of MDT.



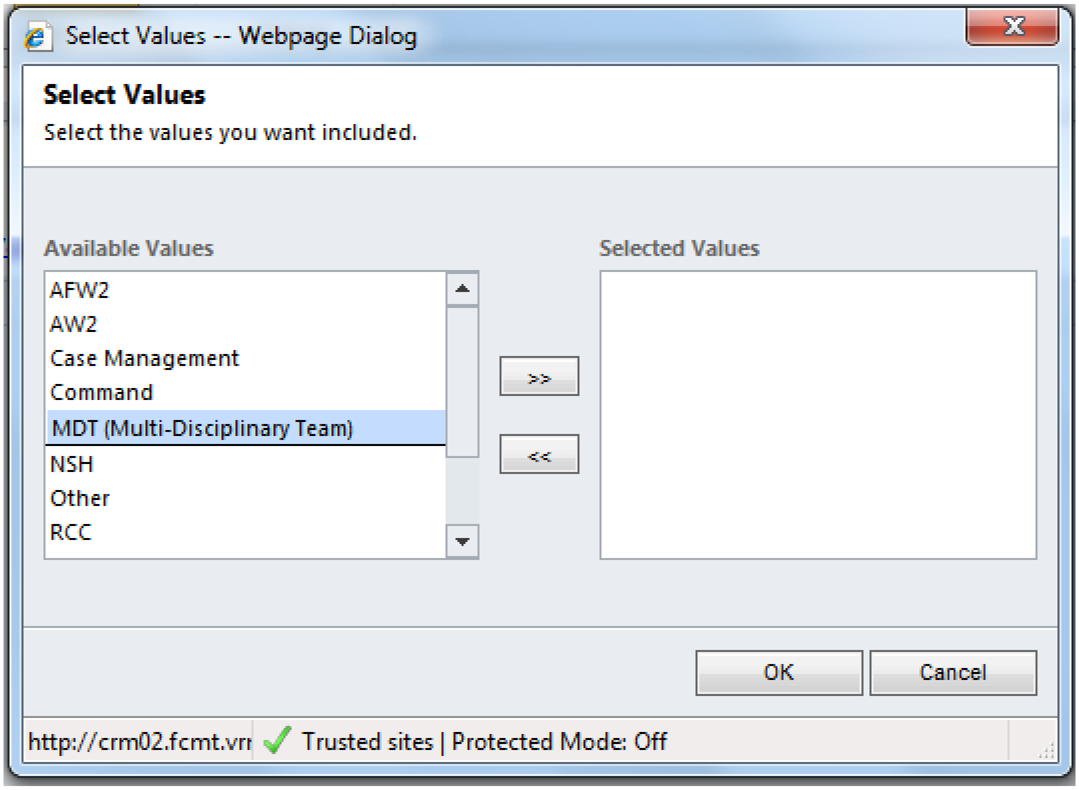
Then select the field or fields to filter.



Then input the formula to use



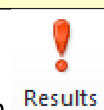
and value to filter.



The new filter line will look like this.

Note

With very few exceptions, when a query is created, the logic should include selecting records where status = "Active." By definition, records where the status is "Inactive" are records that are soft deleted or to be disregarded in reports.

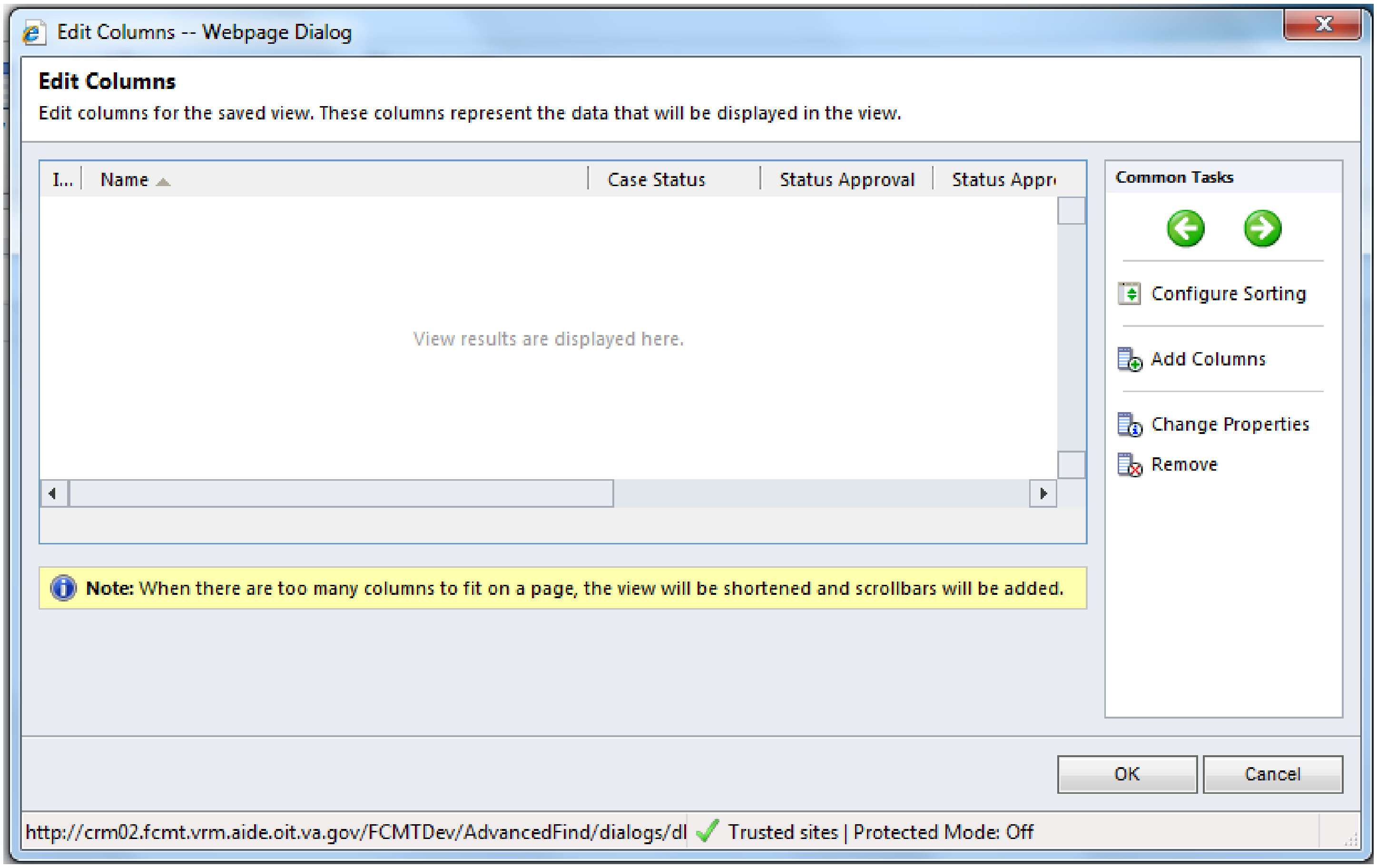
When finished configuring the query, click on the **Results** button 

to preview the results of the query if necessary. If the expected results are less than expected, review and remove any filters which are constraining the returned records.

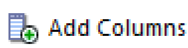
Editing Columns

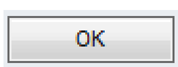
The columns that are displayed for the query results can be configured by selecting the **Edit Columns** button 

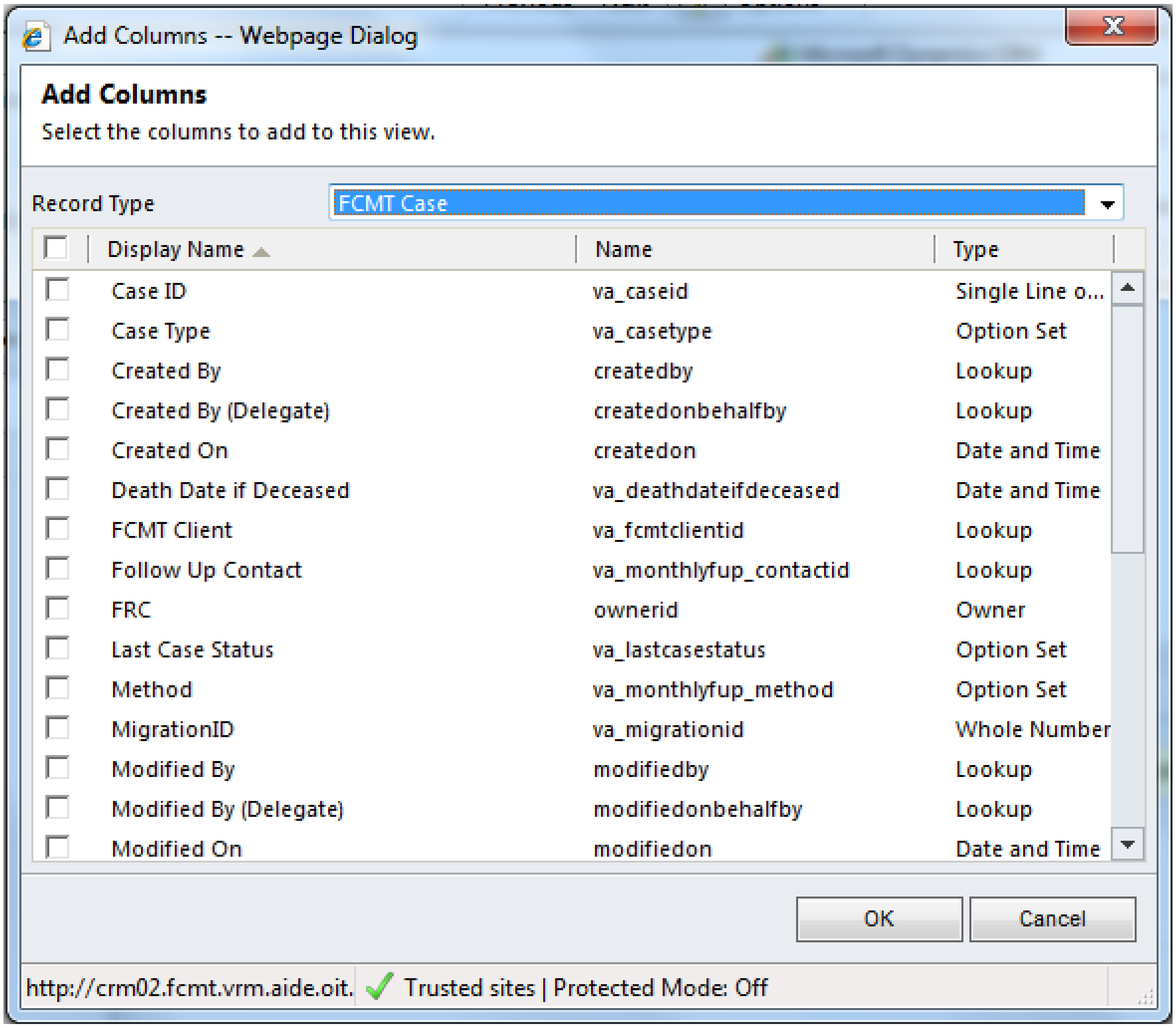
in the ribbon toolbar. Add, subtract, resize and determine sorting characteristics of the columns that should be displayed for the query results which will help when exporting into Microsoft Office.



Add Columns

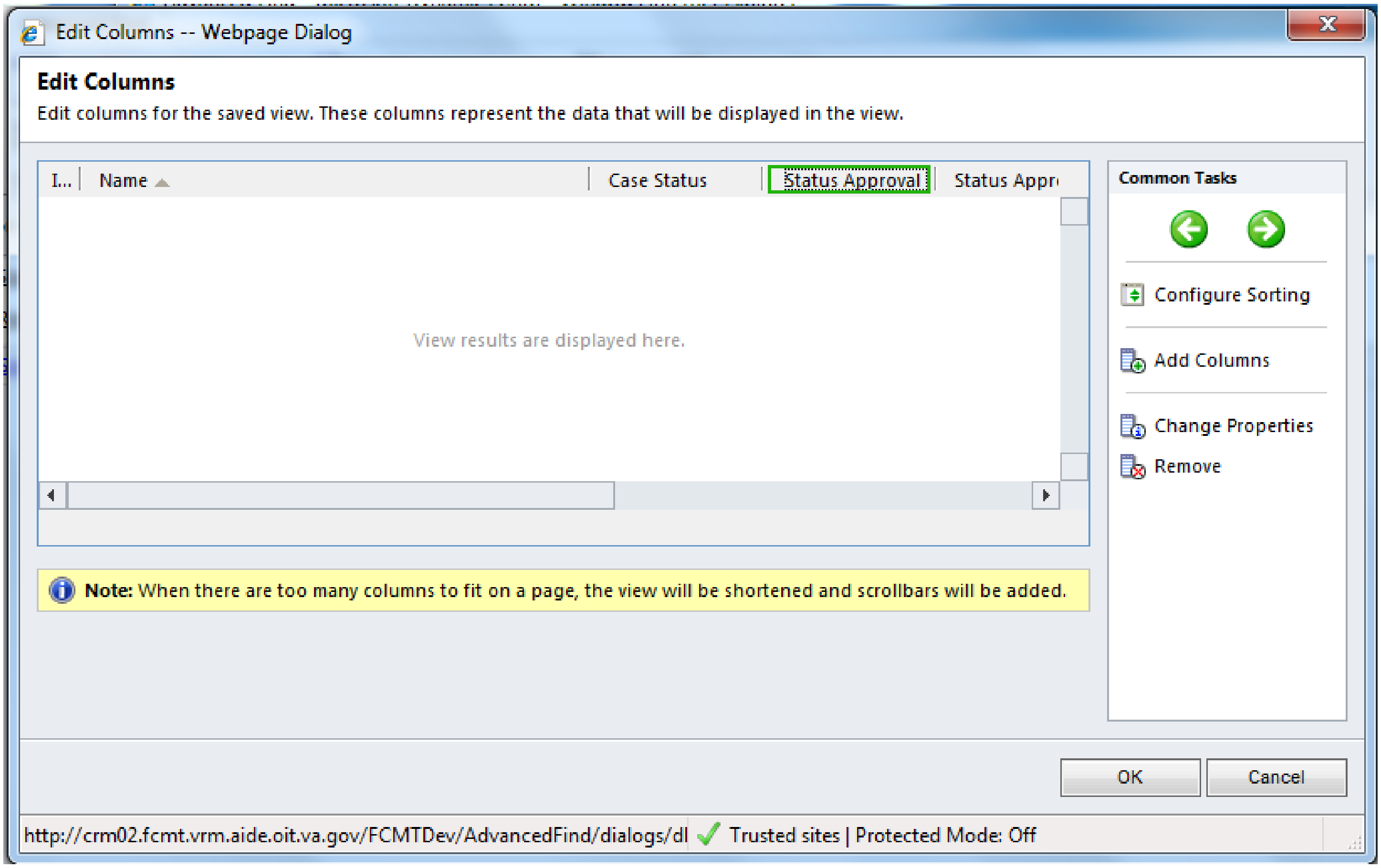
To add columns, click on the **Add Columns** button 

from the ribbon toolbar. Check off the column or columns to add and click the **OK** button. 



Reorder Fields

To reorder fields, click on the field to move and use the left and right buttons to move the field on the grid to the left or right.

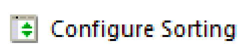


Remove Fields

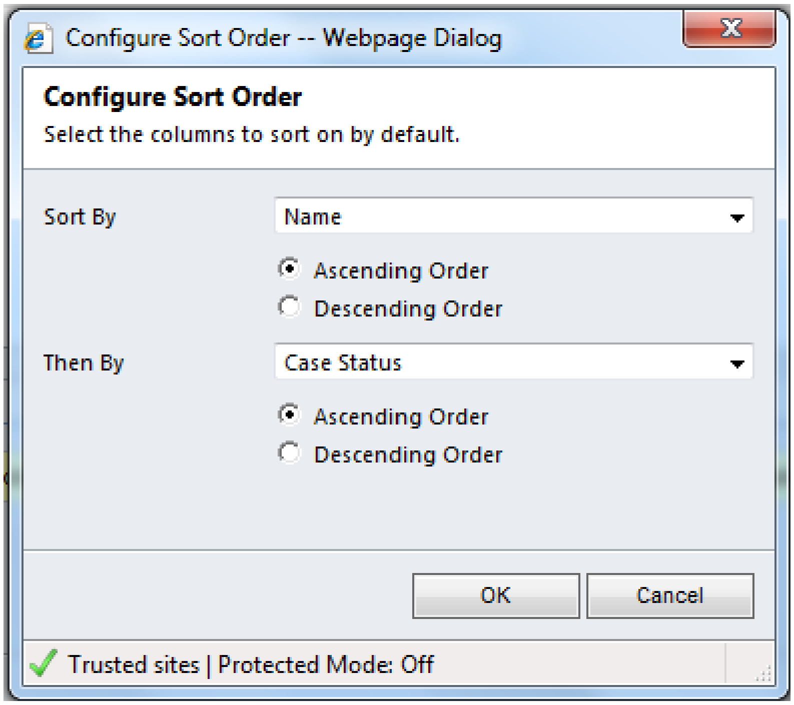
To remove fields, click on the field to remove and then click on the **Remove** button 

.

Change Sorting

To change the sorting, click on the **Configure Sorting** button 

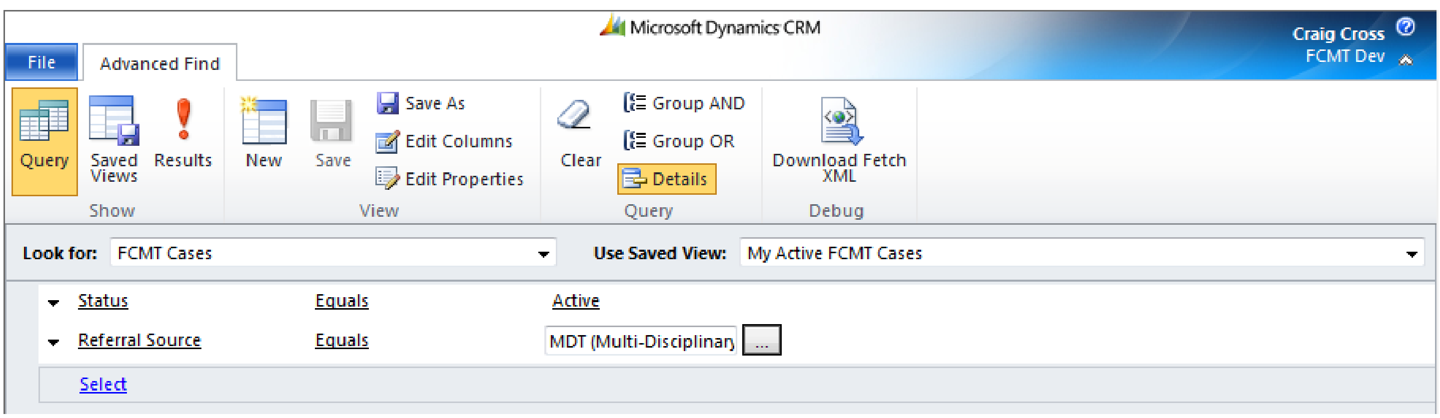
. Choose the one or two fields to sort by either in descending or ascending order.



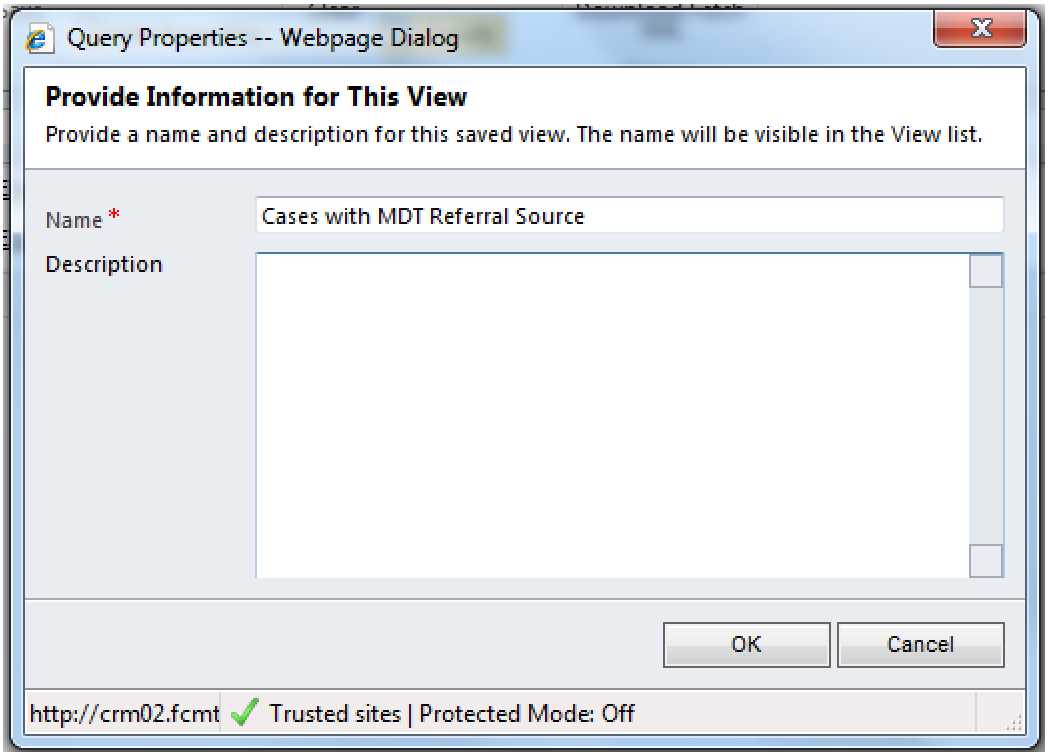
Saving View

Save the view to use it again in the future. To save the currently created view, press the **Save As** button 

.



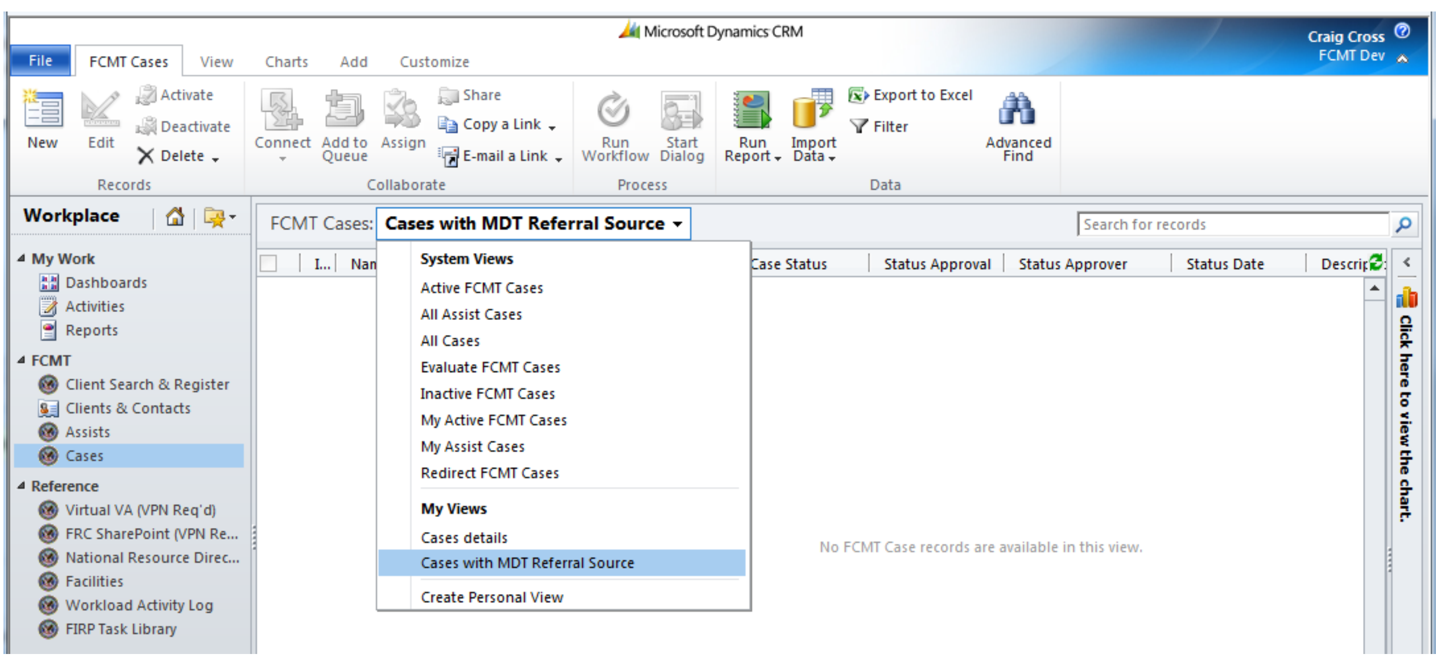
When prompted, name the view.



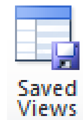
If in the future to edit your changes and re-save the view, go to Advanced Find, open the view under the "Saved Views" tab, make changes and click on the **Save** button 

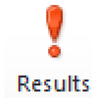
.

The view created can be found in the view list under the section labeled "My Views" for the entity it was created. In this example, it was created for Cases so the new view can be found in the main navigation screen's Cases view. Under FCMT Case dropdown list, the new view is found at the bottom of the list under the "My Views" section of the list.



There are some exceptions to locating a new view that was created. If the entity that the view was created for does not have a left navigation view in the application (i.e. Medical Information, FIRP Task) and you wish to create a specialized view for these entities, you can access the view that was created by returning to the Advanced Find wizard by clicking the **Advanced Find** button 

and click on the **Saved Views** button 

. Find the view that was previously created and double click on it. Click on the **Results** button 

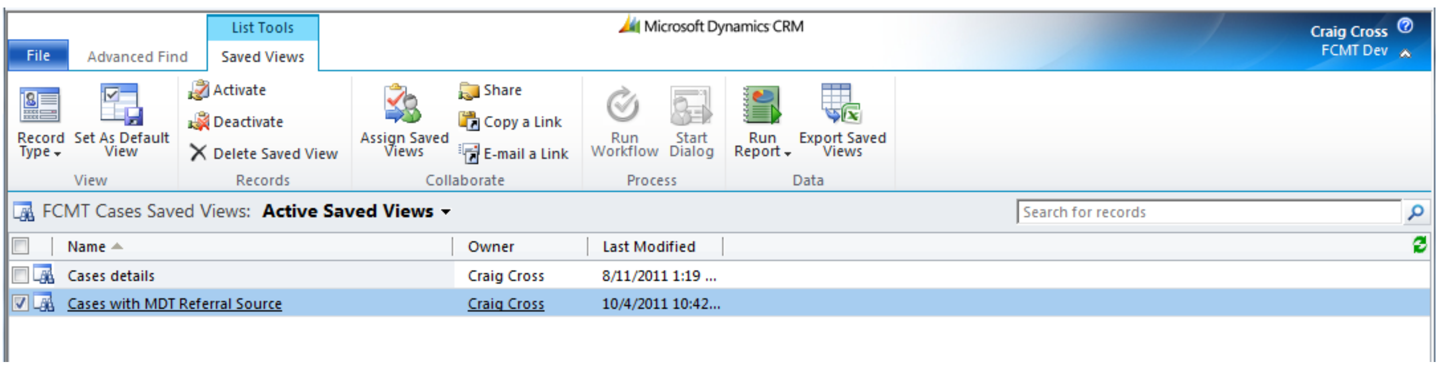
to retrieve the results.

Sharing View

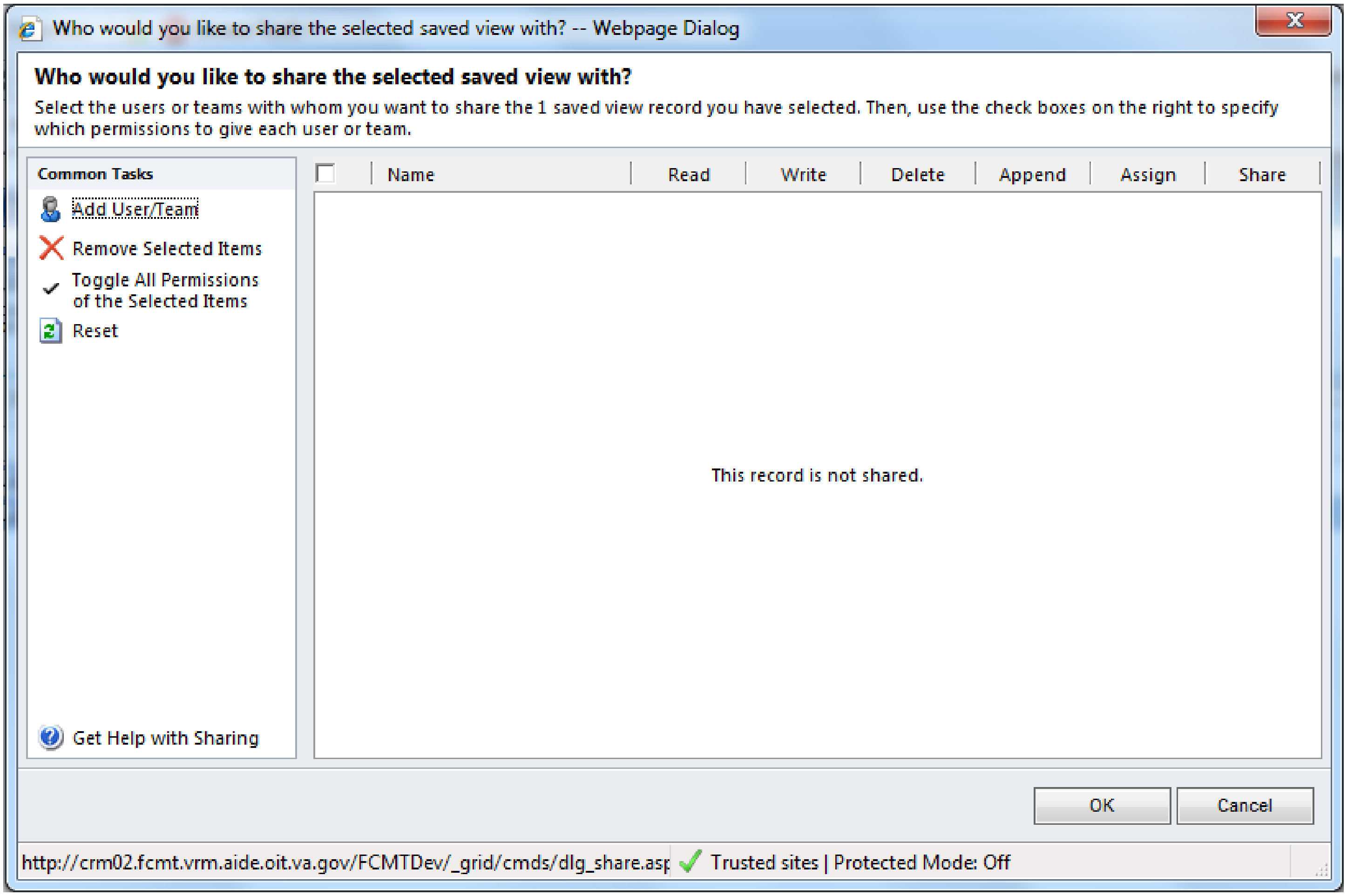
To share a view with another user, users or a team, click on the **Saved Views** button in the ribbon toolbar 

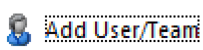
.

Choose the view or views to share.



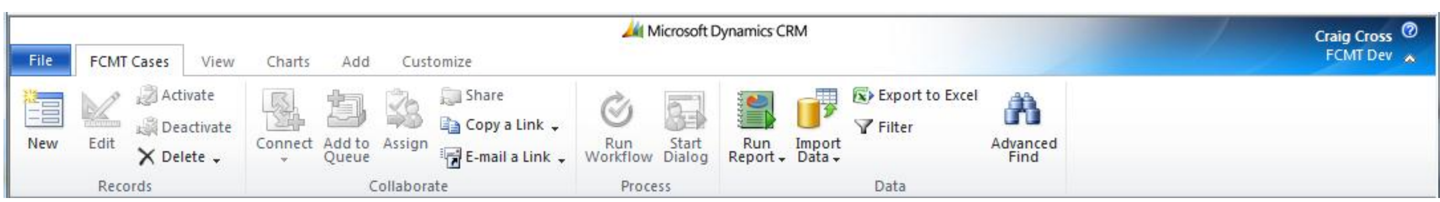
Click on the **Share** button 



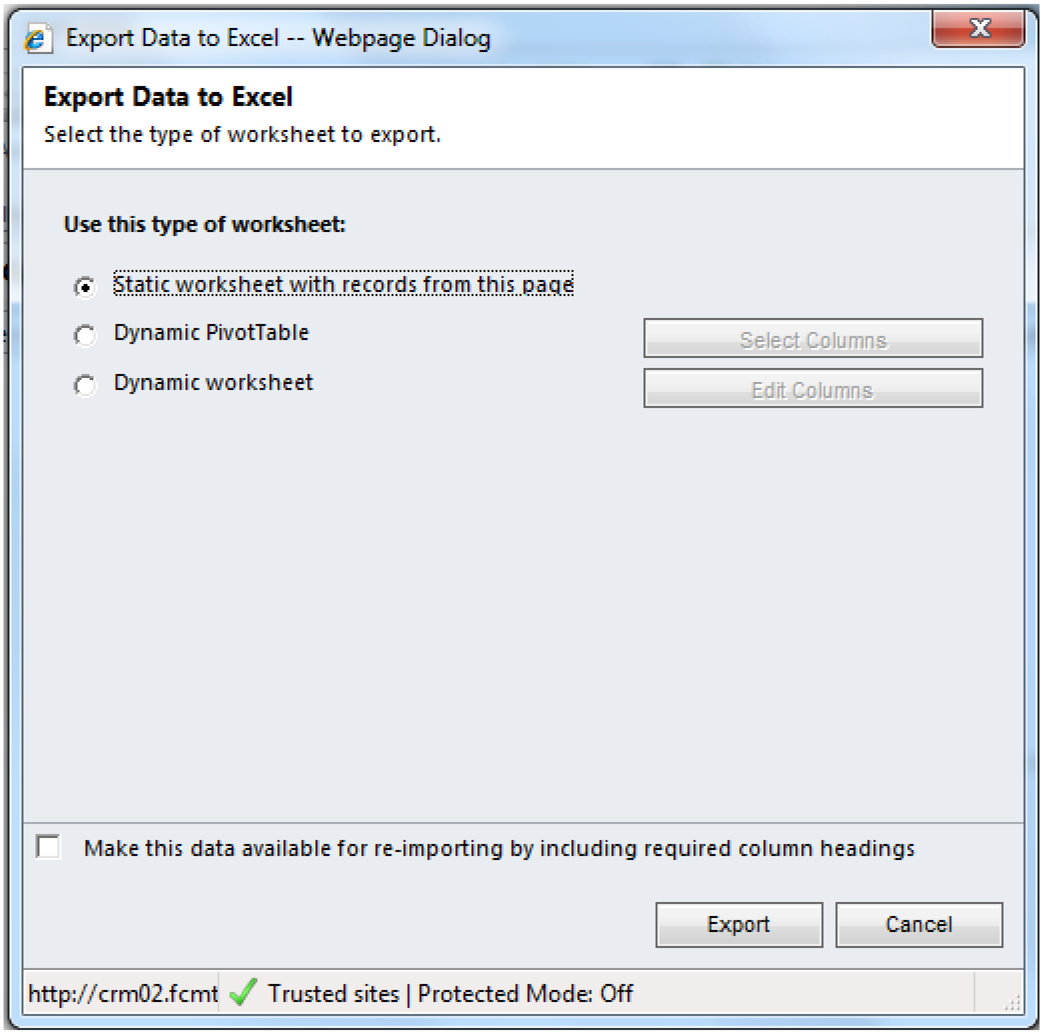
Click on the **Add User/Team** button  to add users and teams. Click the **OK** button when finished.

Exporting to Excel

The option of exporting a view of records to Microsoft Excel can be very useful. To do this, click on the **Export** button in the ribbon toolbar.

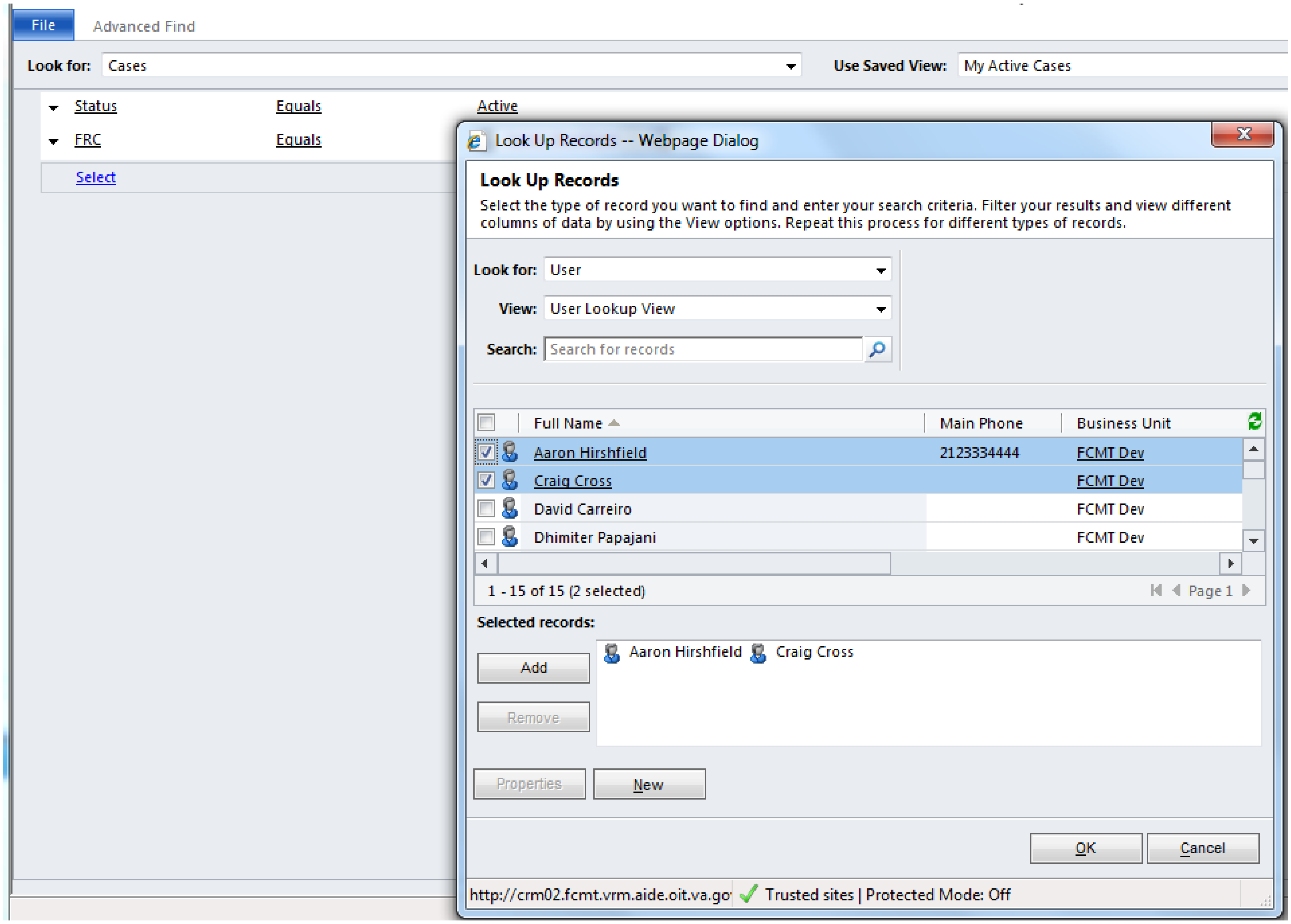


Next, select a static worksheet with records from this page, a dynamic PivotTable, or a dynamic worksheet. "Dynamic" options allow the spreadsheet to refresh the data directly from the FCMT Database without re-exporting or reformatted.

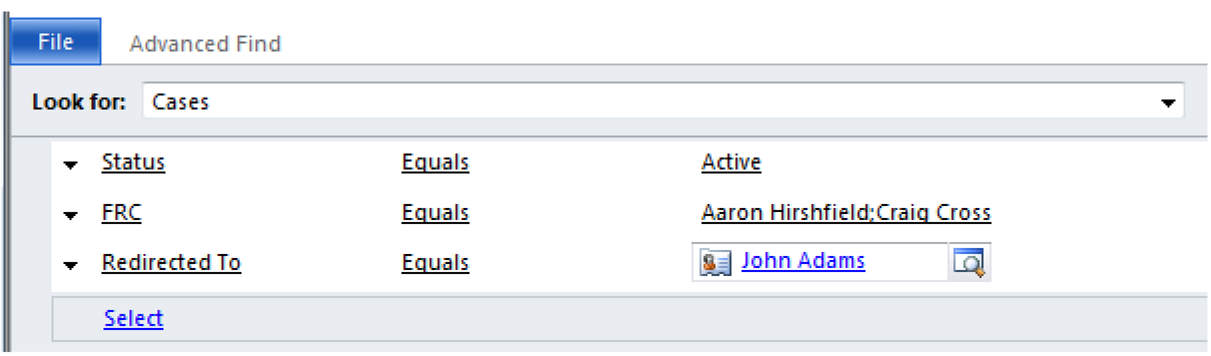


Advanced Filtering

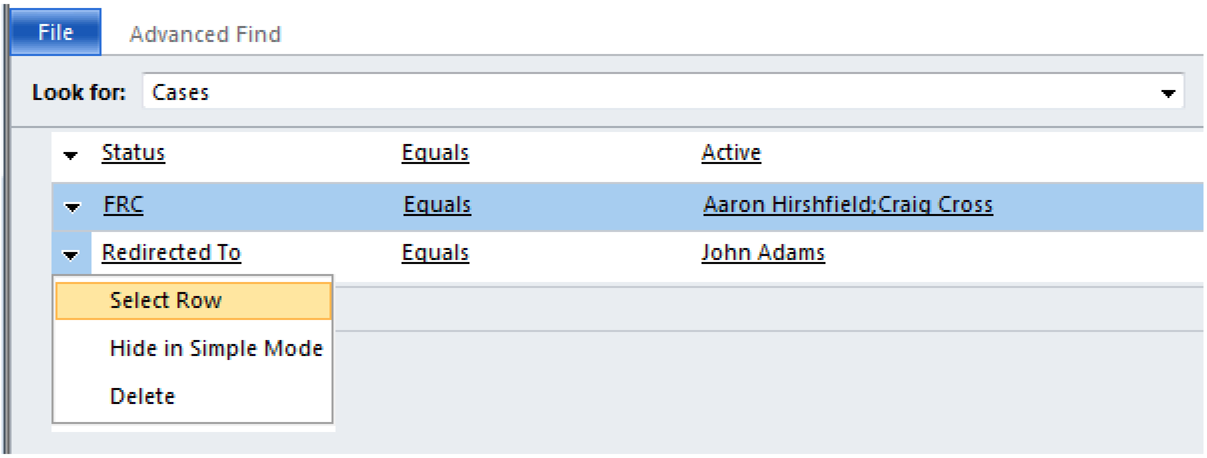
In some cases the logic for filtering may demand an "OR" statement and complex grouping. There are two circumstances for the "OR" criteria. The first is a simple one. If a picklist contains many values and the view should show records with "picklist value 1" and "picklist value 2" add both criteria into the value dialog box. In this example the logic is show all records where the FRC is either "Aaron" or "Craig."



For more complex “OR” statements, use groupings. After adding the two or more query criteria as shown in this example

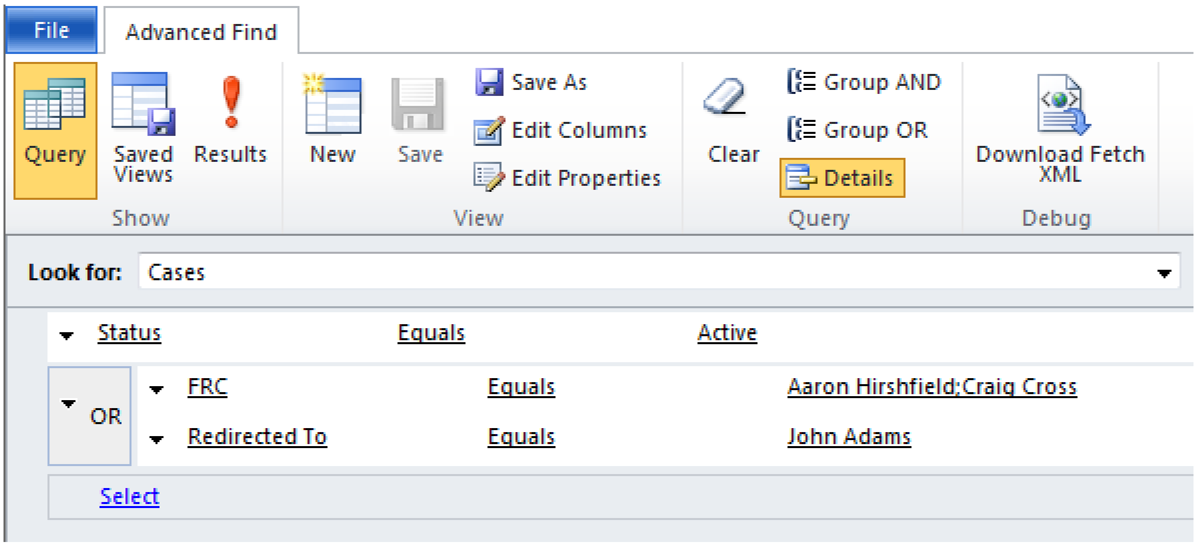


Left mouse click on the triangle ▾ next to the field to group and click on “Select Row.” This will highlight the row.



After two rows are highlighted, click on the **Group OR** button 

in the ribbon.



The logic will follow "show all Cases where the FRC is either Aaron or Craig or the Redirected to = John Adams." Use the **Group AND** and **Group OR** buttons to organize very complex queries.

Conclusion

The Advanced Find function is a quick and powerful tool to help find the specific results you are looking for in the FCMT Database. Learning how to use it and using it often will help speed up your tasks for Microsoft Dynamics CRM 2011.